DOCUMENT RESUME

ED 344 294 EA 023 847

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TITLE Education for All: High Expectations or False Hopes?
INSTITUTION United Nations Educational, Scientific, and Cultural Organization, Paris (France). International Inst. for Educational Planning.
REPORT NO IIEP-Contrib-3
PUB DATE 91
NOTE 33p.; Paper presented at the Conference on "Primary Education Pre-Jomtien" (London, England, United Kingdom, May 7, 1991).
PUB TYPE Speeches/Conference Papers (150) -- Viewpoints (Opinion/Position Papers, Essays, etc.) (120)

EDRS PRICE MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS Access to Education; *Agency Cooperation; Educational Cooperation; Educational Demand; *Educational Objectives; *Educational Opportunities; Elementary Secondary Education; *Equal Education; Foreign Countries; *Government Role; *International Cooperation
IDENTIFIERS *World Conference on Education for All

ABSTRACT

Although the World Conference on Education for All, held in March 1990 in Jomtien, Thailand, fostered international consensus on educational goals and raised expectations, obstacles to successful achievement of education for all (EFA) must be identified. This paper describes the five most important obstacles--political factors, economic/financial factors, lack of demand for education, weak managerial capabilities, and inertia in the current educational system. A conclusion is that the Jomtien conference underlined the social responsibility and international commitment necessary for EFA. Recommendations are made to consider political and economic factors in context and to avoid overemphasis on increasing the supply of educational services. Other suggestions include recognizing the time factor and defining the roles of national governments and international agencies. The appendix describes educational initiatives taken one year after the conference and provides information on the International Institution for Educational Planning (IIEP) members and publications. (3 references) (LMI)

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IIEP Contributions No. 3

Education for all: high expectations or false hopes?

Jacques Hallak

This paper was originally presented at the Conference on 'Primary Education Pre-Jomtien' on 7 May 1991 at the Institute of Education, University of London

International Institute for Educational Planning
(Established by UNESCO)

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The publication costs of this document have been covered through a grant-in-aid offered by UNESCO and by voluntary contributions made by several Member States of UNESCO, the list of which will be found at the end of the document.

This volume has been typeset using IIEP's computer facilities
and has been printed in IIEP's printshop.

International Institute for Educational Planning
7 - 9 rue Eugène-Delacroix, 75116 Paris

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Education for all: high expectations or false hopes?

by Jacques Hallak

The World Conference on Education for All (WCEFA) has probably been the most important educational event to be held in recent decades. Its potential for impact is attested to by the scope of the consensus reached at the Conference:

- It expressed a worldwide consensus on the necessity -- on both ethical and economic grounds -- of *education for all (EFA)*.

- It reaffirmed the principle that education for all *is a societal objective* which cannot be allowed to shape its course according to market mechanisms; and that it is, in effect, a target which can be achieved only through the united effort of partners in all other sectors.

- It adopted and promoted a *broad concept of education*, which involves:

  - more comprehensiveness (from early childhood through continued learning throughout life);
  - outcome- rather than input-oriented planning;
  - all kinds of delivery systems: formal, non-formal and informal education;
  - integrating the school with an enriched learning environment (a literate community, a state of good health and adequate nutrition, etc.).

- It adopted a declaration which implies *de facto* the definition -- at the international, regional and sub-national/local levels -- of *a new social responsibility* which commits governments, donors, families and NGOs to permit the implementation of EFA policies.

Further to this broad consensus and the convergence of views among the participants who anticipated -- as did the international community in general -- steady progress in the area of disarmament, *high expectations were raised worldwide* for the future of education in all countries, since the possibility of more resources being allocated to education, as a result, provided reason for optimism. Indeed, during the past year -- since March 1990 -- a large number of governments *have* taken initiatives to promote EFA, although such initiatives

have so far remained at 'the upstream level', i.e. sector work, planning, programming, identification of funding sources. NGOs -- who were among the most visible actors during the Jomtien Conference -- have also started to organise themselves for follow-up action. Multilateral agencies are mobilising more resources for *basic education* (UNESCO, UNICEF, UNDP, the World Bank) and preparing themselves for more significant action by establishing adequately staffed entities specialised in EFA programmes. Bilateral donors who had not supported basic education in the past are now revising their priorities -- and in some cases restructuring their administration -- to that effect. (Incidentally, the involvement of donors in both the sponsoring and follow-up of the Conference has been such that some observers have used the term 'donor driven initiative' to refer to EFA, rather than the term 'recipients' initiative' which more accurately represents the activities as they are planned by national authorities to be of effect).[1]

Altogether, in contrast with many former education conferences, the Jomtien Conference seems to have generated immediate positive initiatives in many countries and under many auspices. The fact that the largest international and bilateral co-operation agencies expressed their intention to provide significantly increased support to implement national policies of EFA has given greater credibility to the outcome of the WCEFA.

In practice, however, it is a commonly shared view that the aim of *education for all* cannot be achieved everywhere within the time-frame of, say, one decade. In poor societies, this will be a long-term process, requiring tenacious effort, strong and sustained political will, and perhaps brighter economic prospects. In wealthier societies, where the objective implies quite simply 'providing education to the last 10 - 20 per cent of the age group' or 'adult literacy to the poorest 5 per cent', the prospects are certainly far brighter even if EFA is not so easy to achieve. Probably 50 countries belong to the former group, 30 to the latter, and about 80 countries belong to a group where the prospects for achieving the aims of EFA lie in-between. With this in view, the obstacles to achieve EFA must be clearly identified; if they are not, the risk of generating 'false hopes' may in time lead not only observers, but actors also, to refer retrospectively to what had been an admirable ideology of EFA -- but merely that!

1. See Appendix.

The obstacles to be identified are numerous and well known. Perhaps the most important obstacles could be clustered in five categories, namely:

1. Political factors;
2. Economic/financial factors;
3. Lack of adequate demand for education;
4. Weak capacity, in managerial terms, for implementing the broad concept of EFA;
5. Heavy inertia within the existing education systems.

Each of these factors are considered in the sections which follow:

1. Political factors

These are numerous; and they are crucial also, in speeding up, slowing down, or simply blocking the adoption and implementation of Education For All.

It is useful to make a distinction between the political factors which are determined -- or at least perceived to be so -- from without (external) and those which are controlled from within (internal):

(a) The factors determined externally

During the WCEFA, many national representatives expressed doubts about the feasibility of an EFA target. A typical comment to be heard during the Conference was

> *"unless the external debt problem is solved, and/or as long as local and civil wars, and invasion, continue, it is totally unrealistic to expect that the EFA target can be reached".*

Indeed, this comment is a valid one insofar as it highlights:

(i) the *critical lack of public resources available* for allocation to Education For All in many societies in Latin America, Asia and Africa, due to the cost of reimbursement of the external debt;

(ii) the *overwhelming practical barriers* to the actual expansion of access to education, and the risks involved in school attendance for youth and adults in certain areas in Eastern and Southern Africa, as well as in the Middle East. Even where governments of such societies are strongly supportive of EFA policies, they may not be in a position to ensure their implementation.

(b) The factors controlled internally

Many observers *continue* to raise doubts about the *political feasibility* of EFA -- even in countries where there are no local wars, and where the external debt can be tolerated with greater ease. Countries of the Southern Asian region, in some Sub-Saharan areas and a small number of countries in Central and South America face difficulties in reconciling long-term objectives (i.e., EFA aim) with short-term concerns (i.e., avoiding political pressures or, in some cases, instability). It is a fact that implementing EFA policies involves:

(i) Changing radically the *resource allocation structure* in the public sector in general, and education in particular.

(ii) Providing *adequate work and employment* for educated youth and adults, particularly those from rural areas.

(iii) Giving legitimacy to non-government parties whose objectives may not necessarily be convergent with those of the government in power.

(iv) Providing *equal educational opportunities* for and facilitating the social participation of marginalised, and sometimes politically suspect, minorities.

For fear, in part, of aggravating societal tensions, governments may thus tend to opt ultimately for short-term 'non-risk' policies. Of course, observers will agree that in order to take political risks, a government must be both strong and stable: stability being imperative to the continuity and sustainability of activities; and strength being required if pressures are to be resisted from either those socio-economic groups who refuse the changes accompanied by EFA, or those newly-educated groups whose expectations are high and difficult to address in the short-term. At moments in most societies (industrialised and developing) when the role of the State is seriously brought into question, the probability that political actors will give more weight to long-term rather than short-term concerns, is small indeed.

On the other hand, the growing political instability (generated by socio-economic factors and the demands of the youth for greater democracy) in several countries -- particularly in the African Region -- may prove to be particularly helpful for the advancement of efforts addressing structural concerns -- and to promoting EFA policies and their implementation -- which would otherwise be viewed only in the long term.

It goes without saying that, in contrast to policies affecting other sectors, EFA is both a CONDITION for the establishment of democracy (individual freedom and the respect of human rights) and a CONSEQUENCE, or fundamental element, of democracy and development. It is this very nature of EFA -- combining precept and performance -- which ensures the likelihood of adoption of EFA policies in certain societies and yet guarantees that their implementation will be problematic.

Illiteracy and lack of access to education often go hand-in-hand with the lack of participation in, and access to other social services -- and to employment and an adequate income -- securing only poverty and marginality for certain groups of the population. A major task of any advanced social organisation is to recognise social conflicts and guarantee improved equity and greater participation through a more equitable distribution of education, health and wealth. In theory at least, governments are opposed to the continuation of poverty, marginality and social disparities. In practice, however, even in the wealthiest countries in Europe, an increasing part of the active responsibility to address needs in education, health and nutrition is being relinquished to and taken over by charitable organisations. If, as is the case, the social conflicts are too radically exacerbated and too widely distributed through the population, the practical feasibility of establishing a more advanced and equitable social organisation may prove to be so remote as to be of diminished importance in many societies.

Probably the most urgent and important task for the profession has two elements:

(i) to *rethink the policy of EFA* as an integral part of a policy of development, participation, and democracy;

(ii) to *re-examine the practical problems* raised by the need to reconcile the consequences of EFA for the promotion of individual freedom, equity and social efficiency.

2. Economic/financial factors

These factors are closely related to the political ones, and yet they are distinct. The expanded vision of education proclaimed by the World Conference proposes several aims, the fulfilment of which depends on the availability of resources.

A study which was carried out in preparation for the WCEFA[2] produced estimates of the additional costs required for achieving primary schooling for all children by the year 2000. Without policy reform or cost savings, *primary schooling for all* would require an additional cumulative amount of 58 billion US dollars during the decade 1990-2000, over and above what is spent in 1990. With adequate reforms and cost savings, accompanied by improvements in the quality of education consistent with the recommendations of the WCEFA, and the reallocation of resources, *primary schooling for all* would require less: only an additional cumulative amount of 43 billion US dollars.[3] To these amounts should be added the costs of adult education -- 20 to 30 billion US dollars (20 - 30 US dollars per adult) -- and the costs of pre-school education of a reasonable number of children. Altogether, the total additional cost requirements per year would vary between 6 and 9 billion US dollars, according to these assumptions.[4]

These estimates need to be qualified, however, given that economic conditions worldwide are affected to a greater or lesser degree by different forces:

- **Firstly, taken globally, for low and lower income countries,** the additional recurrent costs by the year 2000 would be between 11 and 16 billion US dollars over and above the expenditure in 1990, i.e. an increase from 40 to 60 per cent. In economic environments which are dynamic and growing steadily, the problem does not arise, as efforts taken to improve education in these contexts are not of the same radical nature.

  - *The main cause for concern* is the problematic or bleak economic outlook for many developing countries (those in tropical Africa, in particular). It is of note

2. Christopher Colclough & Keith Lewin, *Educating all the children: the economic challenge for the 1990s* (UNICEF 1990). Presented at the World Conference on Education for All: Meeting Basic Learning Needs, Jomtien, 1990.

3. *ibid.*

4. Estimates based on Christopher Colclough & Keith Lewin. *Ibid.*

that in the 1980s, in spite of rather difficult economic trends, total public expenditure on education grew by almost 6 billion US dollars in Latin America, 10 billion US dollars in the Arab Region, and about 100 billion US dollars in Asia (including Japan). On the other hand, it declined in Africa, by 4 billion US dollars.[5]

- Indeed, what seems to be at first sight an impossible challenge can become quite realistic in more *favourable economic environments*. Between 1975 and 1980, public expenditure on education increased threefold in Africa, and more than doubled in Asia, Latin America and the Arab States.

In view of these precedents, and in the light of the economic and financial prospects of these economies, there is certainly a need to assess the FEASIBILITY of EFA: *finding more 'intelligent approaches' to international co-operation* to assist the developing countries re-establish growth remains a major priority for the world community.[6] To assess the financial feasibility of policies, the only meaningful way is to work at the national level.

- **Secondly then, the picture at the national level:** the types provide striking contrasts indeed:

  - In those countries where the *economic outlook is reasonably bright*, it will be financially possible to implement EFA policies once the resource allocations decided upon are adequate.

  - In other countries, new resources may be required, over and above the budget of the Ministry of Education. These will be assured only if a broader base of government support is secured through the mobilisation of all government

5. Unesco Yearbook, 1990.

6. An example of a possibly more 'intelligent approach' can be given for the area of agriculture. For many years, support was given to large-scale irrigation projects which, because of high investment and operating costs, proved to be an inappropriate means of sustainable poverty reduction and growth. A more 'intelligent approach' would involve direct effort to support sustainable land use by securing water supply in rain-fed agriculture in order to improve production in the long-term and to advance research on the knowledge of local cultivation.

agencies involved in aspects of human development, and if expanded participation by non-government agencies, communities, families and individuals also prevails.

- In other countries -- and these are many -- no matter how well resources are mobilised and allocated, it will still not be possible to respond to presently unsatisfied learning needs. As a result of disadvantageous conditions, these countries -- the least economically developed -- will not be capable of supplying the necessary quantity and diversity of learning opportunity in an immediate/short-term perspective. *Only external support, of a significant amount and sustained over time, will be sufficient to meet the resource needs for basic learning in these countries.* The use of development funds to improve, guarantee or directly pay off debts -- especially if this works as a catalyst and within the framework of debt-for-nature swap or debt-for-education development swap -- is highly recommended.[7]

Furthermore, in order for this investment to yield the appropriate patterns of economic growth, and to eventually lead each country to a level of self-sufficiency in the provision of basic education for its own population, external support will probably need to be distributed through all strategic sectors of development (infrastructural, social and economic), to finance a balanced socio-economic policy, and give support to economic and political change at the grassroot level.

Where this perspective is not clearly perceived, a situation may develop, following the significant support extended by donor countries over time for the implementation of EFA policies, where the relationship between the 'receiving' and the 'donor' countries becomes one of even greater continued dependency, with the benefits which should be accrued by the receiver being less than those expected by the donors.

The issue of dependency, in its origins economic, has been likened to the intervention of external donors in national affairs. Intervention, however, has not, it has been observed, consistently contributed to the socio-economic improvement of the countries receiving aid. An issue of major concern -- the *legitimacy of political intervention* in national affairs -- is therefore raised and needs to be

7. J. Hallak, *Investing in the Future*. UNESCO-Pergamon Press 1990.

the living conditions (cost and equality) of this teaching body are acceptable, and, when feasible, consistent with what they might expect as full-time teachers. Under very specific conditions (i.e., increased pupil/teacher ratios), a more intensive use of personnel and general cost savings may be achieved. But there are formidable constraints to such changes in the use of personnel:

(a) in instances, mostly urban, the staffing ratios are already too high, so that allowing further increases would affect the quality and outcome of education;

(b) in other instances, mostly rural, when the population density is low, so that the staffing ratios cannot be increased without incurring additional funds in order to cover the costs of transporting children or providing boarding facilities.

(ii) **Adopting different delivery systems**

- Increasing the number of days and hours of instruction per year may require less than proportional increase in costs, and hence improve efficiency in the use of educational resources. But it may prove politically difficult to implement.

- Using *distance education technologies* and programmed instructions and learning systems may prove cost effective in taking advantage of the economies of scale. But this requires managerial capacity to organise the delivery systems sometimes lacking in developing societies. However, in both the former and the latter, the proposed adoption of different delivery systems would require a high aggregate and per pupil cost level.

(iii) **Shifting resources from:**

- *Military/security and debt repayment to education*

If politically and practically feasible, this would ease the financial constraints involved and improve the prospects for achieving EFA. Decisions made by a growing number of governments to eliminate or reduce the debt service of some developing economies is a promising trend in this respect. Efforts should be

addressed in terms of the positive effects which should be inherent in such action. It is held, in general, that international intervention in national affairs cannot be justified, particularly where the political regimes in the countries affected operate according to democratic principles. The issue is a difficult one to address positively and objectively. It is clear, however, that in accepting the premise that financial and material support is necessary for the advancement of a national capacity for self-sufficiency in all areas of development, we must also accept that dependency and conditionality are inevitable (and in the short-term essential) consequences of intervention policies, and are temporary conditions which should regulate in time.

Perhaps the experience of the 1970s and 1980s should be drawn in reference in order to serve as an illustration of the danger of partial policies of co-operation which focus on some sectoral allocations and ignore the others: During the period in question, a number of LDCs 'benefited' from large amounts of external support. But this aid was badly allocated, and was directly responsible for the imbalance -- in terms of social and economic growth -- which followed shortly afterwards.

- **The third distinction drawn during the Conference related to packages of policy alternatives to be implemented at the national level with minimised donor support.**

Packages of this type are significant, given that sustained donor support to developing countries is equally contingent upon favourable economic conditions, and it is essential -- and preferable -- that national governments control, to the greatest extent possible, the internal development problems of their education systems within the support funds agreed.

(i) **Reducing unit costs:** Is this feasible?

Through cuts in salary costs and a more intensive use of personnel, unit cost reduction *is* possible. Given the already tremendous deterioration in the real value of teachers' salaries, the effects of this on their morale and motivation, and the importance for developing countries to be able to rely on their services, this alternative appears to be a rather dubious, ill-founded, real option. The use -- as has been suggested -- of assistant teachers or helpers cannot be a viable solution unless

devoted to encouraging governments to stabilise or reduce the share of the budget allocated to Security and Defence.

- *Formal to non-formal (including traditional) alternatives*

The advantage of such a shift of emphasis in the expansion of access to education -- to the benefit of the population measured by the formal system -- is that it encourages community involvement in the collection and management of resources, and hence the diversification of sources of financing and delivery systems without rigid dependancy upon the Ministry of Education budget. On the other hand, the organisation of non-formal delivery system alternatives may require significant initial investment (in time and resources) in order to secure the development of an institutional structure of sufficient delivery capacity, and encourage initiatives in non-formal education.

- *Higher to primary education*

This is a most attractive proposal, given the large share of the education budget currently directed to tertiary education, and the high ratios of per pupil costs in higher in comparison to primary education. Allocating fewer resources to higher education and more to primary means affecting a small number of students in higher education to serve a large number of primary school children. Such a change in the allocation of resources is more equitable, and probably more efficient, if one considers that the rates of return are greater for the primary sector than for the tertiary. In practice, the experience of countries who have tried to reallocate resources is not encouraging. It requires time and strong political will to:

(a) convince the higher education professions that the cut in resources to their sector is constructive insofar as it serves the primary sector;

(b) resist the pressures of other government sectors, and ensure that the changes in resource allocation may continue to directly serve the education sector;

(c) control student movements -- which are generally very well organised -- by accompanying cuts in the budget for higher education with policies of job

creation for youth (secondary and higher education sectors) and the other strategies of income distribution.

3. Demand for education

Though the issue of demand merited some mention in the WCEFA, the overwhelming issue of concern voiced at the Conference was *supply (access, equity) and learning achievement.* The basic assumption of the Declaration and the Framework for Action of Jomtien is that if adequate supply is provided (of quantity, location, quality), then children and adults will enrol, and the objective of EFA will be attained. This may be true in the long run; it certainly is not so in the short run. An analysis of the degree of real exploitation of the total opportunities for access to education -- based on a sample study of selected areas in developing countries -- has highlighted the under-utilisation of the present schooling capacity while a significant number of children remain non-enrolled.

There are four reasons for what may be termed both a lack of demand for education/training, and a worrying under-utilisation of these services (while the forces involved are varied, the outcome is in all cases -- without discrimination -- offensive/grievous):

(a) Child labour

In many cities in developing countries, a large number of young children must work to live; when they can, they attend school partially and continue work at the same time. The only pragmatic and realistic solution to this problem is to *adapt the school to the children* by implementing flexible hours, and adjusting the contents and the methods to the needs and characteristics of working children.

(b) Cost consideration

By shifting the financing of education from the government to the families and local communities -- as is often suggested -- it is likely that fewer and fewer parents will be inclined to send their children to school. Two recent IIEP studies, on Guinea and India, show that parents living in rural areas have contributed all they can afford, materially and financially: the studies affirmed that parents contributed to the school construction, the acquiring of equipment and textbooks, and the operation of the 'school co-operative'.

Demands which comprise financial implications are likely to result in poor parents refusing to send their children to school: unless they are really convinced that they have a say in what the school does.

(c) Quality

Quality is not always, contrary to the image which currently reigns, in an unsatisfactory condition worldwide. Where the school conditions have deteriorated, however, it may be expected that an acute decline in the demand for education will follow. Improving the quality of education -- defined in this narrow sense -- is likely to reactivate the demand. But this is not enough. For parents, quality encompasses more than simply a better school environment, more qualified teachers, and the adequate provision of textbooks. Educational quality to parents and pupils also assumes relevance to local needs, adaptability to local conditions (cultural, economic), special consideration for groups who are particularly marginal (migrant, handicapped), flexibility in addressing cultural obstacles (girls and women), and the integration of formal schooling into a larger and evolving learning environment; the programme must also be seen to equip the pupils to adapt to other environments and economic settings (basics in languages, maths and science). Only a relevant diversified supply of education, finally, can serve unsatisfied learning needs.

(d) Education/training prospects

A weakening of demand may also arise due to the lack of adequate prospects for further education/training following completion of basic education programmes. If the main motivating factors, for parents in rural areas, is to send their children to school in order to prepare them to live outside the rural environment, one must suppose that their demand for primary schooling is largely conditioned by their expectations for post-primary education/training opportunities. When the supply of post-primary education is grossly inadequate, the demand for primary education is thus likely to weaken considerably.

* * *

If the priority given to the demand for education is not consistent with that granted for supply, the prospects for achieving EFA will be further questioned. The dilemma and the challenge for policy makers faced with the issue of demand is due to:

(i) the intricate dependency of the level of demand on the characteristics of the supply, and the need to finance the latter adequately by diversifying the sources of finance;

(ii) the inconsistencies between the aspirations and needs of some parents and communities (i.e., social mobility, economic promotion, urban life), and the proposed objectives of basic education assumed by some promoters of EFA policies (i.e., relevance to local environment). There is no obvious solution to this dilemma.

4. Managerial capabilities

Most countries suffer from weak, inadequate and inefficient administration. The deterioration of the school system during the 1980s meant a deterioration also of managerial capacity in the education/training system. It follows, then, that achieving the goals of Jomtien -- in particular, universal access and greater learning achievement for a larger proportion of the primary school age group -- will require *heavy investment* if an effective and efficient system of management is to be developed. The task involves, basically, the provision of:

(i) a functional structure of the education administration;
(ii) an adequate information system for diagnosis, decision making, monitoring and evaluation;
(iii) a well-trained and motivated staff.

More resources would be required, time to reform the existing administrative machinery would be necessary, and there would be a high demand for training and building capacity with regard to the use of techniques and processes (well-known and familiar to the IIEP, ULIE and other agencies involved in training for educational development).

Given the very inadequate conditions prevailing in many developing countries, to implement a programme for the establishment and improvement of managerial structures becomes in itself a major challenge. By way of illustration, to train the senior and middle level staff of a country with a population of, say, 5 to 10 million would require about three years of intensive activity. Training would need to be accompanied by *structural reform* of the administration, and the establishment of an Educational Planning Management Information System (EPMIS). Both require about three years to implement. Hence, unless

the issue of management is properly addressed, the implementation of EFA policies may not be feasible.

Beyond focusing on the issue of schooling (access, equity, achievement), an expanded 'vision' of education was proclaimed in Jomtien, with three other goals proposed which require more flexible, non-conventional approaches, if they are to be achieved. These should be recalled, as follows:

(i) the broadening and strengthening of the means and scope of basic education;
(ii) the enhancing of the learning environment;
(iii) the strengthening of partnership.

The first represents an *expanded definition of basic education in development*, and is related closely to the other two. The end result -- the expanded definition (combining all three approaches) heralds an enriched learning environment -- an environment characterised by good health and nutrition, adequate childcare and development, a literate and therefore supportive family and community (particularly for its female members) and the provision of the learning essential for both survival and development. The means to achieve such an environment is *strengthened partnership* -- partnership of the lateral type throughout the administrative and educational systems; across development sectors (health, agriculture, education) and across social institutions (government, NGOs, community associations, private and public enterprise).

Implementing the broader means and scope of basic education, enhancing learning environments, and strengthening partnerships, requires considerably different kinds of management, both of organisations and of people, with which the education system often has little experience -- at least in comparison to other Ministries (such as Health) and to NGOs. The system does not have a good record in terms of the functioning of such *links* -- laterally at the school level, across development sectors, and with the other actors in education. Neither has it proved successful in facilitating the local, school-based management of change.

It is clear that in addition to continuing to build the management capacity at central administration level in the areas of access, equity and achievement in education, effort should be devoted to *building management capacities under a broader concept* of basic education. A role of the central administration must therefore be to:

(i) search for and continue to re-define the best 'hybrid' or balance or mix of central-local powers needed to enhance local learning environments;

(ii) in so doing, seek to develop the organisational sources, the skills, knowledge and attitudes, and the administrative structures and procedures required for more collaborative, participatory processes of development;

(iii) learn to become the facilitator (more than it is at present) -- rather than the controller -- of school- and community-based management of change.

To achieve this will require a great deal of *experimentation*, 'trial and error' approaches, and evaluation. There is, unfortunately, little expertise in this area, though much can be learned from NGOs involved for many years in innovative reform efforts. The documentation is often promotional or descriptive, and at best, well designed conceptually. Very little rigorous evaluation has been completed. It may well be too early to prescribe any guidelines for establishing an adequate system of management to respond to the needs of the broad concept of basic education as adopted in Jomtien. But this makes it all the more urgent to begin to organise the 'base' of knowledge and experience available, to initiate more controlled experiment, and to develop and try out guidelines and activities for training and for larger educational change.

5. Inertia in the education system

Inertia is the term used to refer to the condition of a certain quality of managerial activity; this condition itself becomes even more acute in consequence of other very distinct circumstances. Because the WCEFA focused its attention on the broadening of the concept of education and the expansion of access to it, it has tended to ignore the basic constraints resulting from the mode of operation of the education system itself, in other words, schools and non-conventional approaches to education (the non-formal).

(a) Schools first

The term 'inertia' renders quite well the role of the school in terms of *social selection*: its role in this domain is well-known and documented. The purposes of a policy of democratisation in education are:

(i) to increase the number of beneficiaries;

(ii) to reduce educational disparities among different socio-economic groups;

(iii) to see that the new beneficiaries behave similarly as the old and enjoy the same quality of service.

There may be contradictions or inconsistencies between (i), (ii) and (iii), and by achieving one or two purposes, the third may suffer. This is so essentially because of the well established social selection function of the school system. If one of the most important goals of Jomtien is the democratisation of education, then it is not enough to target the supply to the most under-served part of the population; *changing demand is also necessary* in order to overcome the inertia of the system. This is, evidently, easier to say than to achieve. The methods of teaching, the content, the hidden curricula, the social background and attitude of the teaching force, the language of instruction, etc., are among the many different parameters of the school system which will need to be changed if the goals of Jomtien are to be achieved. Assuming the political will is there, and the resources are available, a great deal of time is needed.

Inertia affects also the mechanical relationships between various tiers and segments of the education system.

Beyond a certain proportion of children completing primary education, no country has ever succeeded in *controlling the access* to secondary and hence to higher education. In other words, by successfully expanding access to primary schooling, and expanding the number completing the cycle, a strong pressure will develop for the diversion of resources to secondary education, to the detriment (or expense) of primary education, thus jeopardising the likelihood of achieving EFA. Planners are familiar with this phenomenon in the school system, referred to as 'internal dynamics'. The question then can be raised as to whether EFA is a realistic 'social project' if it does not account for, and build into its framework for action, the implications (in terms of supply) for the secondary and tertiary tiers of the education system. (In fact, I have argued elsewhere[8] that from a strategic point of view, there may be ground for supporting policy choices which would prioritise resource allocations over a time to the higher, rather than lower, levels of the educational system). In short, given the internal rigidity of the school system, achieving EFA means achieving more in secondary and higher education also, including all of what this implies in terms of resources and policy choices.

8. Jacques Hallak, *Investing in the Future*, UNESCO:IIEP/Pergamon Press, 1990. Chapter 6.

(b) Non-conventional approaches to education

The implicit assumption of the WCEFA is, however, that a large proportion of the unsatisfied learning needs will be addressed by non-conventional approaches to education. Are these approaches more adaptable? Are they less afflicted by the lethargic weight suffered in other areas of the formal school system? Would they prove, in time, capable of fulfilling a social function other than the tasks of selection applied through the present system? Would they generate more movement internally than is at present evident? Although no rigorous data is available, the following may be anticipated:

- As long as the share of the non-conventional modes of delivery remains small, it would be safe to assume that expansion of access through the modes of delivery in question would *generate movement rather than inactivity.*

- As long as the issue of the *'standard'* of graduates or 'completers' of primary education, as compared to those who have been educated through non-conventional approaches, is not raised with regard to applications for access to secondary education, the question of inertia and rigidity is of little relevance.

- But if implementing the goals of EFA means, in some countries, a significant expansion of non-school education, then the success of any such policy of expansion would ultimately depend greatly on the capacity of the traditional school system to overcome its inertia -- a product of the system's regulations and operational modes -- and accept to treat the output of non-school programmes on a basis of 'equal footing'. The facts argue strongly in favour of policies which *focus on achievement rather than input.* By deciding to monitor access to secondary education through achievement tests, and by giving appropriate consideration to the relevance of education, the resistance of the traditional school system to change may be overcome.

But here again, assuming there is a political will, and that resources and managerial capabilities are available, TIME is needed before a change of such magnitude in the educational system can be achieved.

Concluding remarks

It may appear precipitated and ill-timed to infer conclusive findings with regard to the successful implementation of EFA 12 months following the World Conference *declaration*. It is worthwhile, however, following discussion of the major factors which have the power to act in both advancing or checking the achievement of the Jomtien goals, to sound a note of caution, and to account for the reasons for this approach. It is clear that:

(1) There can be no room for *generalisation* in efforts to qualify the achievements and potential of EFA.

(2) Jomtien can be credited with the high expectations it raised; but efforts must be made to maintain the credibility/sustainability of the objectives so that the very real risk of expectations dissolving into *false hopes* does not materialise.

Jomtien should be credited with achieving more than a consensus and convergence of views on a broader concept of education. Among the important statements which may be singled out are those relating to:

- the need for partnership and alliance;
- the priority to be given to education on both economic and ethical grounds.

But one of the most valuable outcomes of Jomtien was the implicit proclamation that the responsibility for providing EFA cannot be left to market mechanisms at a time when the market seems to have gained a monopoly in organising and regulating social and economic life. Indeed, Jomtien underlined that *EFA is a social responsibility*, involving all national actors (both public and private) and *an international commitment* from co-operation agencies. In this respect, high expectations can be fully justified.

The words of caution relate particularly to the ambiguities apparent and/or comparisons to be made:

(1) The vital importance of POLITICAL FACTORS has been to some extent overlooked. EFA means a great deal more than equal access to schooling or other delivery systems. It involves an insistence on more social equity. For governments, this would result in a greater supply of tenacious political ability which at present is often lacking; it involves the respect of human rights and works at the ground level

toward the advancement of economic as well as political democracy. Indeed, the present socio-political instability and turmoil among the youthful population in a growing number of African regions, may suggest that,

(a) Either EFA will figure low in the agenda of priorities and be replaced by strategies directed to solve other problems such as the *integration of youth into society* (15 to 24 years old). Or that,

(b) EFA cannot simply be an end in itself: *it should be accompanied by adequate policies* to promote democracy, social development, participation and economic growth.

(2) FINANCIAL FACTORS should not be raised in isolation. These become vital issues when the economy is in bad condition. This theory is easily proven, unfortunately: and the economies of many countries are unstable. The implementation of EFA goals will consequently depend greatly on external support of massive proportions. Three issues are thus raised:

(a) Given the disastrous economic conditions prevailing in a large number of countries, significant proportions of the resources available from some donors are being used to subsidise the government budget; they are not being allocated to particular sectors or programmes of development. In such circumstances, and without substantial changes in the economic conditions, *is it realistic to expect such a massive flow of funds to finance of EFA?*

(b) Will a massive flow of external resources to finance EFA be sustainable in the long run? *Sustainability requires economic growth.* Without appropriate action to change the economic prospects of many countries for the coming decade, can we reasonably believe the expectations built into the Jomtien goals to be legitimate?

(c) *Are external co-operation agencies ready* to move from the practice -- officially proclaimed -- of 'non-interference, providing incentives and responding to specific needs', to a policy of massive support and assistance which will *de facto* generate dependency, and direct interference? And will governments of recipient countries approve the consequences of such a change?

(3) The World Conference deliberations over-emphasised the need to increase the SUPPLY OF EDUCATIONAL SERVICES, particularly at basic/primary level. In so doing, it overlooked two essential dimensions of EFA policies:

(a) It minimised the importance of the *social demand* for basic education. Even today, actors who are highly placed in education believe that a programme of EFA is similar to a programme for regulating a river bank or for eliminating yellow fever. Does it automatically follow that free entry to theatres and concerts will attract sufficient numbers of the less privileged or the poorest socio-economic population groups to fill the halls? Supply alone is not enough; addressing the *issue* of demand is crucial. There is no quick fix. Changing demand for education means changing social aspirations, expectations and behaviours; it means, also, diversifying supply to make it more relevant to demand. All of this will prove much more complex and time consuming than is believed in many quarters.

(c) It ignored the intricate and strong *inter-relationships* between different types and levels of education and training. By successfully increasing access to the lower levels, we must expect a significant increase in the numbers completing education, and thus a boost in the magnitude of social demand for the upper levels of education and training. Redeploying resources from upper levels to lower levels of education, as often suggested, may certainly be justified on economic, educational and ethical grounds. But the real difficulty is to define how to 'dose' the redeployment: below a certain level, the system remains highly inequitable; beyond a certain level -- fully justified by the needs to address the unsatisfied learning needs of the population -- redeployment may produce both social and economic problems if it does not address the social demand for upper levels of education and/or if it does not address the education/training needs of the economy in management, engineers and skilled labour.

Altogether, it is safe to say that the challenge for planners and policy makers is to act in a way which limits the risks of EFA becoming *merely* an ideology.

Suggestions for planners and policy makers

Finally, in an attempt to summarise the considerations highlighted and arguments forwarded during the course of my speech, I am led once again to pause in perusal of the TIME FACTOR. Because of the magnitude of the EFA objective, TIME is a fundamental concern in the adoption and implementation of EFA policies everywhere -- irrespective of the level of economic and social development. This is not to suppose that we have reason to be sceptical of actions proposed in the IMMEDIATE TERM which may be of limited outcome. On the contrary, *we have a duty to respond to the urgency proclaimed at the World Conference through generating follow-up initiatives to Jomtien.*

The roles of national governments, funding agencies and international co-operation agencies at the most senior level of responsibility should be clearly underlined. If confusion and ambiguity -- and in consequence failure to achieve the goals which have been agreed internationally -- are to be avoided, it is essential that the roles of these powerful bodies be interpreted also through consensus and established so that each acts independently but coherently within the whole. Without strong political will from the top (Prime Ministers and Presidents) to take into consideration the multi-sectorial characteristics of EFA policies, the efforts taken by Departments of Education may prove of little effect. The co-ordinating mechanisms at the international level, led by UNESCO, will need to be maintained if full benefit is to be secured through the complementarity of efforts of all agencies involved in human resources development. The size, scope and duration of flows of external funds in some countries are of such magnitude that only through the clear review, discussion and acceptance of the implications of these inputs in the long-term will governments and donors commit themselves to the appropriate implementation of EFA policies.

I shall now turn to the practitioners with suggestions, of topical importance, for further review and discussion:

1. *We must re-think the policy of EFA* as an integral part of a policy of development and democracy; we need to analyse the practical problems it raises for decision-makers with regard to strategies for implementation. More particularly, we need to:

   (a) Decide what exactly is meant by what the international community has referred to as a *flexible framework* necessary to ensure political management for the resolute promotion of EFA.

(b) *Review, experiment and evaluate experiences* of policy packages (including poverty alleviation, health, employment ...) for sectorial re-allocation of resources.

(c) Evaluate the implications and feasibility of educational programmes to suit the needs of *children at work, women living in adverse cultural/economical environments* which prohibit them from educational opportunities, and *youth and adults of non-peaceful regions*.

2. Experiment, and collect information on *empirical cases where the expanded definitions of basic education apply*. In particular, study how to manage, plan and organise a strengthened partnership with a multiplicity of actors who will interact with each other and the Ministry of Education. Discuss and assess the training needs and how to satisfy them.

3. Design, test and *develop supply/demand models* which will help in the study of different types of resource allocation, by level of education and between formal and non-conventional approaches to learning. Internal linkages must operate between levels and types of education; if not, the design of the pragmatic strategies which are being promoted as important contributions to EFA in certain countries, is doomed to remain conceptually interesting, but in terms of applicability and impact, useless.

Appendix

Three years ago, there was a broad consensus on the rather bleak conditions of and prospects for education systems in many developing countries (in particular among the LDCs). The programmes to reduce illiteracy were phased out; little effort was taken to halt the deterioration of primary schooling conditions (not to say the near collapse of a very large number of school buildings, in particular in Sub-Saharan Africa); teachers were underpaid and unmotivated, often absent from the classrooms. Typically, financial constraints and economic recession led to budgetary cuts, deterioration of the quality and conditions of schooling, and even in some countries to decline in enrolments. Two years ago, when the proposal to organise the WCEFA was approved by the four main sponsors, donors, governments and the professional community of educators alike wondered whether it would not turn out to be yet another 'international gathering with more rhetoric than achievement'; and whether it could contribute positively to addressing the educational issues facing the developing world.

What is there to be reported a year later? **Is there a clear indication of a genuine political will, or is this effort doomed to remain a rhetorical expression** as has happened with similar events in the past? Indeed, a year later the commitments at national, regional and international levels, in both the public and private sectors seem, at first sight at least, impressive. Although no comprehensive data is available, partial indications illustrate the magnitude of the commitments made by some governments, donors and NGOs:

> *Many governments have already initiated action* to follow up the WCEFA at the country level. These countries include Afghanistan, Bangladesh, Bhutan, China, India, Indonesia, Iran, Laos, Maldives, Pakistan and Vietnam in Asia; Argentina, Brazil, Chile, Colombia, Ecuador, El-Salvador, Jamaica and Mexico in Latin America; and over half of the African countries, where illiteracy rates are highest, as well as a few European countries. However, up until now -- with rare exceptions -- the focus of the government attention in different countries has been on 'upstream analytical work', i.e. definition of basic learning needs of specific population groups, assessment of resource requirements, design of a strategy and/or of a plan of action to move towards EFA, and active mobilisation of partners to the government authorities in charge of education and training. Yet there are no examples to report of governments who have changed their resource allocations to increase the share of the education budget going to basic education and training for youth and adults.

Outside the central governments, there is no systematic information base on the trends and initiatives taken by local public authorities and/or communities, the private sector and the social and professional organisations (i.e., the so-called NGOs). Still, there is something to report on *the efforts of NGOs*:

> During the World Conference, NGOs played a crucial and highly visible role. They were present as equal partners to government donor delegates. Two hundred of them joined in a statement presented at the closing session of the Conference. They asserted their power, influence, and proximity to the 'people' and are now insisting on their right to be heard in national, regional and international follow-up meetings. The networking and delegation of authority required for this -- in spite of differences of opinions among NGOs as to how closely they should work with donors and governments -- are being created with increasing effect.

Perhaps the most significant changes have occurred or are occurring in the programmes of the *international agencies*. Multilateral agencies (in particular UNDP, UNESCO, UNICEF and the World Bank) have taken a number of initiatives which illustrate their commitment to the follow-up of Jomtien:

- allocating more resources to EFA;
- the establishment, within their organisational frameworks, of Divisions to cope with the work necessary for implementing EFA programmes.

- UNESCO has mobilised, from its regular budget, an initial amount of two million US dollars and established a unit to take charge of the promotion of WCEFA follow-up.

- The World Bank is expected to increase the proportion of loans extended for basic education, from 25 per cent of the overall budget for lending in education in 1990, to 35-40 per cent in the coming years.

- With respect to the UNDP, human resource development is being increasingly recognised as central to sustained growth and has become a major priority area in the agency's programme.

- UNICEF is developing its own power for action, both at central and country levels, by recruiting a large number of field staff and establishing a central core unit to deal with the follow up of EFA.

- A Development Committee -- under the auspices of OECD -- is focusing its attention on human resource issues. At its meeting next autumn, it will devote the topic of its sessions to EFA.[9]

Changes have also been reported for bilateral donors. Until recent years, a large number of bilateral donors had limited their support to post-primary education, mainly to higher education and technical and vocational education and training. After the WCEFA, a number of donors decided to place emphasis on Basic Education. Indeed, some agencies have even established specialised entities within their administrations to promote and manage programme activities in the area of EFA.

9. In the case of the IIEP, about 50 per cent of all the resources for 1991 have been re-allocated to programmes in support of EFA.

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IIEP Contribution No. 3

The World Conference on Education for All (Jomtien, Thailand, March 1990) was probably the most important educational event to be held in recent decades and it seems to have generated immediate positive initiatives in many countries and under many auspices. In spite of this, it is a commonly shared view that the aim of *education for all* cannot be achieved everywhere within the time-frame of, say, one decade.

The obstacles are numerous and well known. The author of this paper identifies what he sees as the most important and clusters them into five categories: (i) political factors; (ii) economic/financial factors; (iii) lack of adequate demand for education; (iv) weak capacity, in managerial terms, for implementing the broad concept of EFA; (v) heavy inertia within the existing education systems.

Each of these factors is considered in this paper, originally presented at a seminar held at the University of London Institute of Education in May 1991.

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